



MONITORING EU AGRI-FOOD TRADE

DEVELOPMENTS in May 2025

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Note to the reader

The latest available consolidated trade data at EU level cover market developments up to May 2025. Monthly figures are compared with the previous month. Year-on-year change compares the cumulative trade since the beginning of the year with the same period in the previous year.

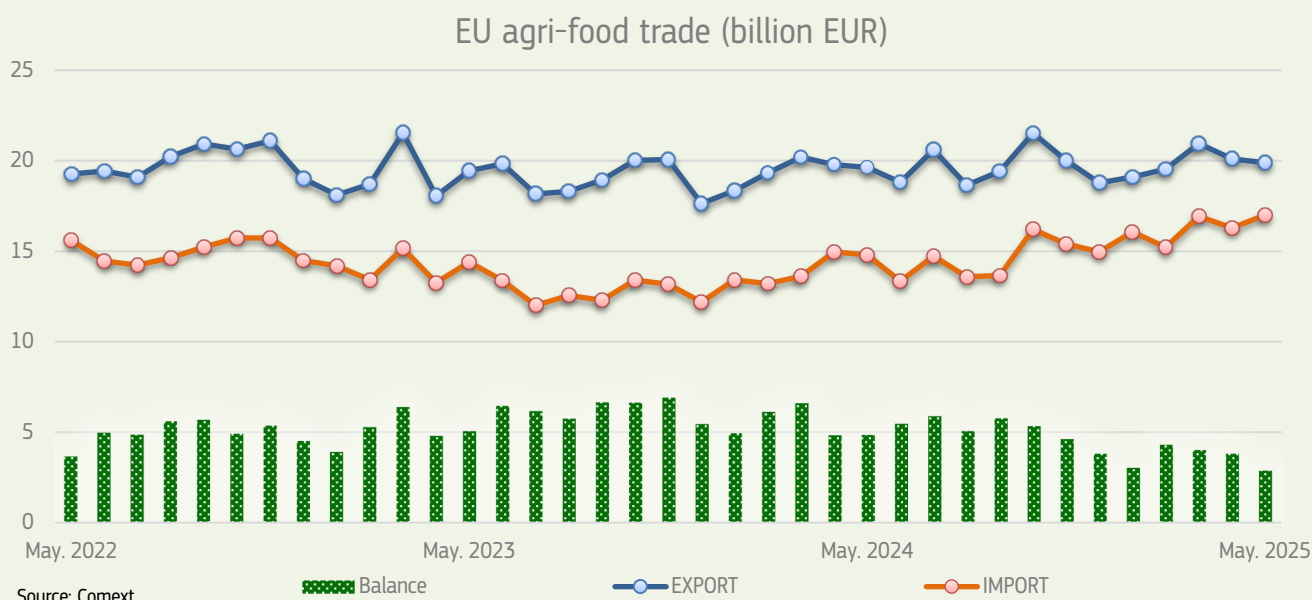
The trade figures are expressed in values, except when specifically mentioned. Price variations are based on a unit value that is the average price of products traded in the period concerned (trade value at the border divided by the quantity registered).

HIGHLIGHTS: High prices of cocoa, coffee and fruit imports lower the EU trade surplus

EU exports reached EUR 19.9 billion in May 2025, a reduction of 1% on the previous month but still 1% higher than in May 2024. Between January and May, cumulative EU exports reached EUR 99.6 billion, this is 2% higher than in the same period in 2024. Prices for exports of cocoa-based products remained high, while exports of cereals declined. EU exports to the UK increased, while they decreased in direction of China.

EU imports increased by 4% month-on-month in May, reaching EUR 17 billion. This is 15% higher than in May 2024. Since January, cumulative imports reached EUR 81.5 billion, up 16% compared to the same period in 2024. This is explained by high import prices, in particular for cocoa and coffee, as well as fruit and nuts. Imports from Côte d'Ivoire remained high, while those from Ukraine declined.

The EU agri-food trade surplus declined by 24% in May compared to the previous month and reached EUR 2.9 billion. Between January and May, the EU surplus reached EUR 18.1 billion. This is a reduction of EUR 9.2 billion compared to the same period in 2024, primarily due to increases in the prices of EU imports.



EU AGRI-FOOD EXPORTS

UK, US AND SWITZERLAND ARE THE LEADING DESTINATIONS OF EU EXPORTS

EU agri-food exports reached EUR 19.9 billion in May 2025, a reduction of 1% on the previous month but still 1% higher than in May 2024. Between January and May, cumulative EU exports reached EUR 99.6 billion, an increase of 2% (+ EUR 2.3 billion) compared to the same period in 2024.

The **UK** remained the leading destination of EU exports, representing 23% of EU exports between January and May (EUR 23 billion). This is an increase of EUR 964 million (+4%) compared to the same period in 2024, mainly due to increased prices of cocoa-based products.

The **US** was the second destination of EU exports, with a value of EUR 12.7 billion (13% of EU exports). This is an increase of EUR 700 million (+6%) between January and May compared to 2024. This was partly explained by an increase in the value of cocoa-based products, as well as spirits, dairy and wine exports.

Switzerland was the third destination and represented 6% of EU exports (EUR 5.7 billion). Exports grew by EUR 555 million (+11%) since January compared to 2024, mainly due to the high prices of cocoa products.

By contrast, exports to **China** decreased by EUR 619 million (-11%) between January and May

compared to 2024, due to a strong reduction in the volume of cereal exports.

EU CEREALS EXPORTS DECLINED IN THE BEGINNING OF 2025

Exports in the **coffee, tea, cocoa and spices** category had the largest increase in value, rising by EUR 1.6 billion (+39%) between January and May 2025 compared to 2024. This was mainly driven by a twofold price increase in cocoa paste, butter and powder exports, as well as a 30% increase in coffee export prices.

Exports of **confectionery and chocolate** also increased by EUR 831 million (+20%), mainly due to the high prices of chocolate exports (+31%).

Exports of **dairy products** increased by EUR 574 million (+7%), primarily due to higher prices, while volumes declined by 2%.

By contrast, EU **cereals** exports decreased by EUR 1.3 billion (-22%) between January and May 2025 compared to 2024. This is mainly explained by reductions in exported volumes (-28%), while prices increased by 7%.

Exports of **olives and olive oil** decreased by EUR 459 million (-14%) compared to 2024. This was driven by a 27% reduction in prices, after a peak in 2024. This was partly offset by a 17% increase in export volumes.



EU AGRI-FOOD IMPORTS

BRAZIL, UK AND US ARE THE TOP SOURCES OF EU IMPORTS

The value of EU agri-food imports reached EUR 17 billion in May 2025. This is 4% higher than the previous month and 15% higher than in May 2024. Since January, cumulative EU imports reached EUR 81.5 billion. This is an increase of EUR 11.5 billion (+16%) compared to 2024, mainly explained by high prices for several EU imports, particularly cocoa and coffee.

Brazil remained the leading source of EU agri-food imports, representing 9% of EU imports (EUR 7.5 billion). Imports from Brazil increased by EUR 591 million (+9%) between January and May compared to 2024, mainly due to higher coffee prices.

The **UK** followed, representing 8% of EU imports (EUR 6.5 billion), with an increase of EUR 336 million (+5%) compared to 2024.

Imports from the **US** represented 7% of EU imports (EUR 5.9 billion), as they increased by EUR 878 million (+17%) compared to 2024, mainly due to higher maize imports, as well as nuts and spirits, while soya imports decreased.

Imports from **Côte d'Ivoire** had the largest increase in value compared to 2024 (+ EUR 1.8 billion, +68%), mainly due to high cocoa prices. Those from **Canada** increased by EUR 933 million (+93%), mainly due to large increases in cereals and rapeseed imports. Imports from **China** followed with an increase of EUR 868 million (+24%), due to increases across

most product categories, notably non-edible products (including fatty acids and waxes). Imports from **Australia** also increased by EUR 790 million (+111%), mainly due to a strong increase in rapeseed imports, but they remain below their 2023 level.

By contrast, imports from **Ukraine** decreased by EUR 687 million (-12%), mainly due to lower imports of cereals and rapeseed. Imports from **Russia** decreased by 74% (- EUR 480 million) between January and May compared to 2024, mainly due to a fall in imports of oilseeds, margarine and other oils and fats, and cereals.

COFFEE AND COCOA PRICES REMAIN HIGH

Imports of **coffee, tea, cocoa and spices** increased by EUR 6.9 billion (+62%) between January and May 2025 compared to 2024. This is mainly explained by higher import prices: cocoa prices doubled, and coffee prices rose by 64%.

Imports of **fruit and nuts** also grew by EUR 1.8 billion (+18%), mainly due to higher prices (+15%).

Imports of **non-edible products** increased by EUR 588 million (+15%), mainly due to higher prices.

By contrast, imports of **olives and olive oil** decreased by EUR 378 million (-41%) due to both lower import prices and volumes.

Imports of **sugar and isoglucose** decreased by EUR 347 million (-39%), mainly due to reduced volumes (-32%).

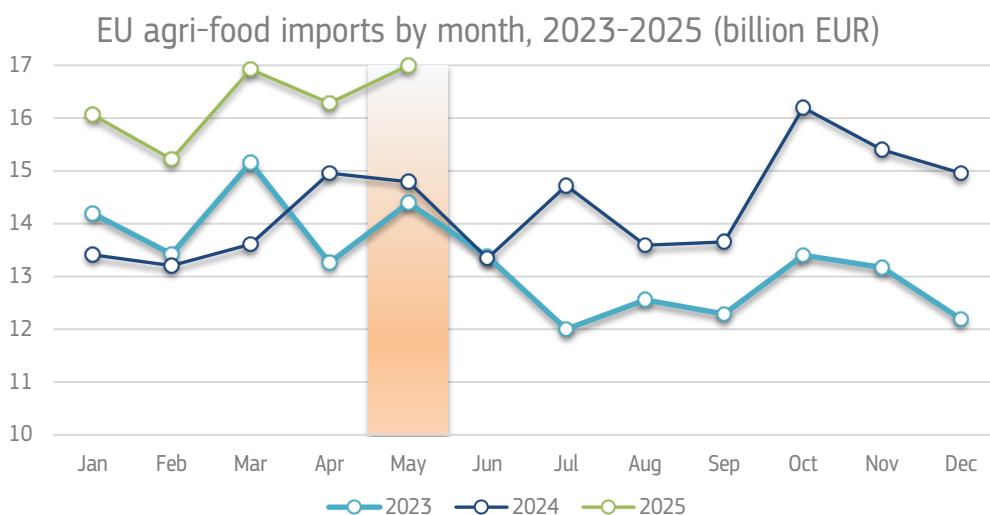


TABLE 1

EU AGRI-FOOD EXPORTS – COUNTRIES WITH MOST IMPORTANT CHANGES (million EUR)

	yearly data			monthly data			
TRADING PARTNERS	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- May24	Jan25- May25	<i>Difference</i>	
TOTAL AGRIFOOD	228 790	235 066	100%	97 282	99 566	2 283	2%
United Kingdom	51 745	53 927	23%	22 059	23 023	964	4%
United States	27 192	30 413	13%	12 016	12 716	700	6%
Switzerland	11 597	12 266	5%	5 181	5 736	555	11%
Türkiye	4 871	5 166	2%	2 312	2 682	370	16%
Norway	5 943	6 036	3%	2 546	2 817	271	11%
Japan	7 876	8 175	3%	3 531	3 396	- 135	-4%
Thailand	1 459	1 518	1%	634	490	- 144	-23%
Saudi Arabia	4 646	4 644	2%	2 017	1 850	- 166	-8%
Russian Federation	6 763	6 015	3%	2 581	2 378	- 203	-8%
China	14 603	13 243	6%	5 853	5 235	- 619	-11%
Other countries	92 095	93 661	40%	38 553	39 242	689	2%

TABLE 2

EU AGRI-FOOD EXPORTS – TOP 15 EXPORT COUNTRIES (million EUR)

	yearly data			monthly data			
TRADING PARTNERS	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- May24	Jan25- May25	<i>Difference</i>	
TOTAL AGRIFOOD	228 790	235 066	100%	97 282	99 566	2 283	2%
United Kingdom	51 745	53 927	23%	22 059	23 023	964	4%
United States	27 192	30 413	13%	12 016	12 716	700	6%
Switzerland	11 597	12 266	5%	5 181	5 736	555	11%
China	14 603	13 243	6%	5 853	5 235	- 619	-11%
Japan	7 876	8 175	3%	3 531	3 396	- 135	-4%
Norway	5 943	6 036	3%	2 546	2 817	271	11%
Türkiye	4 871	5 166	2%	2 312	2 682	370	16%
Russian Federation	6 763	6 015	3%	2 581	2 378	- 203	-8%
Canada	4 469	4 808	2%	1 843	1 954	111	6%
Saudi Arabia	4 646	4 644	2%	2 017	1 850	- 166	-8%
Korea, Republic of	4 542	4 270	2%	1 889	1 816	- 72	-4%
Ukraine	3 461	3 633	2%	1 523	1 736	214	14%
Morocco	3 831	3 593	2%	1 601	1 667	66	4%
Australia	3 769	4 169	2%	1 638	1 600	- 38	-2%
Israel	2 773	2 903	1%	1 209	1 426	217	18%
Other countries	70 710	71 803	31%	29 485	29 533	48	0%

TABLE 3

EU AGRI-FOOD EXPORTS – PRODUCT CATEGORIES WITH MOST IMPORTANT CHANGES (million EUR)

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24-May24	Jan25-May25	Difference	
TOTAL AGRIFOOD	228 790	235 066	100%	97 282	99 566	2 283	2%
Coffee, tea, cocoa and spices	8 137	10 731	5%	4 032	5 624	1 592	39%
Confectionery and chocolate	10 764	11 803	5%	4 192	5 023	831	20%
Dairy products	19 580	19 629	8%	7 966	8 540	574	7%
Tobacco, cigars and cigarettes	7 026	7 770	3%	3 313	3 627	314	9%
Cereal preparations and milling products	24 305	24 748	11%	9 978	10 273	295	3%
Beer, cider and other beverages	10 781	10 827	5%	4 499	4 385	- 115	-3%
Non-edible for technical use	4 447	4 587	2%	2 130	1 890	- 240	-11%
Preparations of fruit, nuts and vegetables	12 379	12 895	5%	5 479	5 231	- 247	-5%
Olives and olive oil	5 111	7 199	3%	3 199	2 739	- 459	-14%
Cereals	14 611	11 721	5%	5 676	4 404	-1 272	-22%
Other products	111 649	113 156	48%	46 819	47 829	1 010	2%

TABLE 4

EU AGRI-FOOD EXPORTS - TOP 15 EXPORT PRODUCT CATEGORIES (million EUR)

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24-May24	Jan25-May25	Difference	
TOTAL AGRIFOOD	228 790	235 066	100%	97 282	99 566	2 283	2%
Cereal preparations and milling products	24 305	24 748	11%	9 978	10 273	295	3%
Dairy products	19 580	19 629	8%	7 966	8 540	574	7%
Wine and wine based products	17 606	17 383	7%	6 774	6 704	- 70	-1%
Mixed food preparations and ingredients	14 427	15 634	7%	6 367	6 637	270	4%
Coffee, tea, cocoa and spices	8 137	10 731	5%	4 032	5 624	1 592	39%
Preparations of fruit, nuts and vegetables	12 379	12 895	5%	5 479	5 231	- 247	-5%
Pigmeat	12 269	12 367	5%	5 125	5 103	- 22	0%
Confectionery and chocolate	10 764	11 803	5%	4 192	5 023	831	20%
Cereals	14 611	11 721	5%	5 676	4 404	- 1 272	-22%
Beer, cider and other beverages	10 781	10 827	5%	4 499	4 385	- 115	-3%
Vegetables	8 802	9 280	4%	4 013	4 217	204	5%
Pet food and forage crops	8 305	8 462	4%	3 546	3 711	165	5%
Tobacco, cigars and cigarettes	7 026	7 770	3%	3 313	3 627	314	9%
Other animal products	8 320	8 271	4%	3 428	3 408	- 20	-1%
Spirits and liqueurs	9 069	8 716	4%	3 283	3 306	22	1%
Other products	42 409	44 829	19%	19 612	19 374	- 238	-1%

TABLE 5

EU AGRI-FOOD IMPORTS – COUNTRIES WITH MOST IMPORTANT CHANGES (million EUR)

TRADING PARTNERS	yearly data			monthly data			
	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- May24	Jan25- May25	Difference	
TOTAL AGRIFOOD	159 424	171 847	100%	69 979	81 488	11 509	16%
Côte d'Ivoire	4 055	6 760	4%	2 591	4 353	1 762	68%
Canada	2 845	2 540	1%	1 001	1 933	933	93%
United States	11 683	11 935	7%	5 059	5 937	878	17%
China	8 347	9 154	5%	3 546	4 414	868	24%
Australia	2 580	1 857	1%	710	1 499	790	111%
Moldova, Republic of	891	989	1%	398	283	- 115	-29%
Indonesia	5 474	5 245	3%	2 137	1 974	- 164	-8%
Tunisia	886	1 292	1%	689	521	- 168	-24%
Russian Federation	1 892	1 027	1%	646	167	- 480	-74%
Ukraine	11 839	13 094	8%	5 668	4 981	- 687	-12%
Other countries	108 933	117 956	69%	47 535	55 427	7 893	17%

TABLE 6

EU AGRI-FOOD IMPORTS - TOP 15 IMPORT COUNTRIES (million EUR)

TRADING PARTNERS	yearly data			monthly data			
	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- May24	Jan25- May25	Difference	
TOTAL AGRIFOOD	159 424	171 847	100%	69 979	81 488	11 509	16%
Brazil	17 215	17 424	10%	6 943	7 534	591	9%
United Kingdom	15 511	15 378	9%	6 149	6 485	336	5%
United States	11 683	11 935	7%	5 059	5 937	878	17%
Ukraine	11 839	13 094	8%	5 668	4 981	- 687	-12%
China	8 347	9 154	5%	3 546	4 414	868	24%
Côte d'Ivoire	4 055	6 760	4%	2 591	4 353	1 762	68%
Türkiye	6 627	7 314	4%	2 976	3 173	196	7%
Viet Nam	3 216	3 836	2%	1 670	2 272	602	36%
Morocco	3 182	3 447	2%	1 914	2 183	269	14%
Argentina	4 663	5 559	3%	1 821	2 122	301	17%
Switzerland	4 859	5 048	3%	1 987	2 103	116	6%
India	3 302	3 975	2%	1 577	1 992	415	26%
Indonesia	5 474	5 245	3%	2 137	1 974	- 164	-8%
Canada	2 845	2 540	1%	1 001	1 933	933	93%
Peru	3 089	3 768	2%	1 270	1 588	318	25%
Other countries	53 518	57 371	33%	23 669	28 444	4 775	20%

TABLE 7

EU AGRI-FOOD IMPORTS – PRODUCT CATEGORIES WITH MOST IMPORTANT CHANGES (million EUR)

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- May24	Jan25- May25	Difference	
TOTAL AGRIFOOD	159 424	171 847	100%	69 979	81 488	11 509	16%
Coffee, tea, cocoa and spices	20 564	30 324	18%	11 169	18 061	6 892	62%
Fruit and nuts	22 336	24 938	15%	10 360	12 187	1 828	18%
Non-edible for technical use	9 393	9 628	6%	3 866	4 454	588	15%
Confectionery and chocolate	2 390	2 900	2%	1 021	1 386	366	36%
Tobacco, cigars and cigarettes	4 734	5 096	3%	2 138	2 449	310	15%
Vegetable oils (oilseeds and palm)	7 708	7 586	4%	3 180	3 158	- 23	-1%
Pet food and forage crops	3 146	3 403	2%	1 441	1 415	- 26	-2%
Oilseeds and protein crops	21 142	20 040	12%	8 346	8 294	- 52	-1%
Sugar and isoglucose	2 797	1 742	1%	899	553	- 347	-39%
Olives and olive oil	1 226	1 755	1%	913	536	- 378	-41%
Other products	63 989	64 436	37%	26 646	28 996	2 350	9%

TABLE 8

EU AGRI-FOOD IMPORTS - TOP 15 IMPORT PRODUCT CATEGORIES (million EUR)

	yearly data			monthly data			
AGRI-FOOD CATEGORIES	Jan.-Dec. 2023	Jan.-Dec. 2024	Share 2024	Jan24- May24	Jan25- May25	Difference	
TOTAL AGRIFOOD	159 424	171 847	100%	69 979	81 488	11 509	16%
Coffee, tea, cocoa and spices	20 564	30 324	18%	11 169	18 061	6 892	62%
Fruit and nuts	22 336	24 938	15%	10 360	12 187	1 828	18%
Oilseeds and protein crops	21 142	20 040	12%	8 346	8 294	- 52	-1%
Non-edible for technical use	9 393	9 628	6%	3 866	4 454	588	15%
Cereals	11 691	9 734	6%	4 050	4 149	99	2%
Vegetables	5 860	6 171	4%	3 107	3 220	113	4%
Preparations of fruit, nuts and vegetables	6 730	7 588	4%	3 009	3 194	185	6%
Vegetable oils (oilseeds and palm)	7 708	7 586	4%	3 180	3 158	- 23	-1%
Mixed food preparations and ingredients	5 958	6 539	4%	2 721	2 807	86	3%
Tobacco, cigars and cigarettes	4 734	5 096	3%	2 138	2 449	310	15%
Cereal preparations and milling products	4 806	5 209	3%	2 100	2 287	187	9%
Other animal products	5 416	5 077	3%	2 122	2 284	162	8%
Margarine and other oils and fats (vegetable	3 908	4 170	2%	1 601	1 884	283	18%
Spirits and liqueurs	4 516	4 383	3%	1 621	1 720	99	6%
Pet food and forage crops	3 146	3 403	2%	1 441	1 415	- 26	-2%
Other products	21 517	21 963	13%	9 148	9 924	776	8%

TABLE 9

EU AGRI-FOOD TRADE BALANCE (million EUR)

	EXPORTS	IMPORTS	TRADE BALANCE		
AGRI-FOOD CATEGORIES/PERIOD	Jan25-May25		Jan24-May24	Jan25-May25	Difference
	million EUR				
Total Agrifood	99 566	81 488	27 303	18 077	-9 226
Cereal preparations and milling products	10 273	2 287	7 878	7 987	109
Dairy products	8 540	1 154	7 060	7 386	326
Wine and wine based products	6 704	596	6 172	6 108	- 64
Pigmeat	5 103	143	4 970	4 960	- 10
Mixed food preparations and ingredients	6 637	2 807	3 646	3 829	184
Confectionery and chocolate	5 023	1 386	3 172	3 637	466
Beer, cider and other beverages	4 385	1 010	3 513	3 374	- 139
Pet food and forage crops	3 711	1 415	2 104	2 295	191
Olives and olive oil	2 739	536	2 285	2 204	- 81
Preparations of fruit, nuts and vegetables	5 231	3 194	2 470	2 037	- 432
Spirits and liqueurs	3 306	1 720	1 662	1 585	- 77
Poultry and eggs	2 626	1 295	1 519	1 331	- 188
Horticulture	2 302	1 065	1 218	1 237	20
Tobacco, cigars and cigarettes	3 627	2 449	1 174	1 178	4
Other animal products	3 408	2 284	1 306	1 124	- 183
Vegetables	4 217	3 220	905	996	91
Beef and veal	2 104	1 187	1 041	917	- 124
Sugar and isoglucose	914	553	76	361	286
Cereals	4 404	4 149	1 626	255	-1 371
Unspecified	448	283	358	165	- 193
Sheep and goat	425	716	- 192	- 291	- 99
Margarine and other oils and fats (vegetable)	1 012	1 884	- 698	- 872	- 174
Vegetable oils (oilseeds and palm)	1 005	3 158	-2 078	-2 152	- 75
Non-edible for technical use	1 890	4 454	-1 736	-2 564	- 828
Oilseeds and protein crops	990	8 294	-7 362	-7 304	58
Fruit and nuts	2 918	12 187	-7 648	-9 270	-1 621
Coffee, tea, cocoa and spices	5 624	18 061	-7 137	-12 438	-5 301
<i>For info: fish and fish products</i>	<i>3 341</i>	<i>12 860</i>	<i>-8 874</i>	<i>-9 519</i>	<i>- 645</i>
<i>Total agrifood and fish</i>	<i>102 907</i>	<i>94 349</i>	<i>18 429</i>	<i>8 558</i>	<i>-9 871</i>

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